

#MoSummit2016



DIFP
Department of Insurance,
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Trends and Transformations Impacting Today's Producer



2016 Director's Regulatory Summit

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Panelists

Zac Anschutz, Advisors Excel

Matthew Diddy, Edward Jones

Larry Case, Missouri Association of Insurance Agents

Moderated by:

Carrie Couch, Missouri DIFP



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Overview

- DOL Fiduciary Rule
- Financial Exploitation of the Elderly
- Value added services



DOL Fiduciary Rule

- What is a fiduciary?
- What products are impacted?
- Who is impacted?
- How are commissions impacted?
- How can I comply?



Financial Exploitation of the Elderly

- What is Financial Exploitation?
- Who is at risk?
- Red Flags?
- Who are the perpetrators?
- How to respond?



Customer Needs and Wants

- Value Added Services
- Communication and Client Engagement
- Asking the Right Questions
- Meeting Clients Needs



Contact the Panelists

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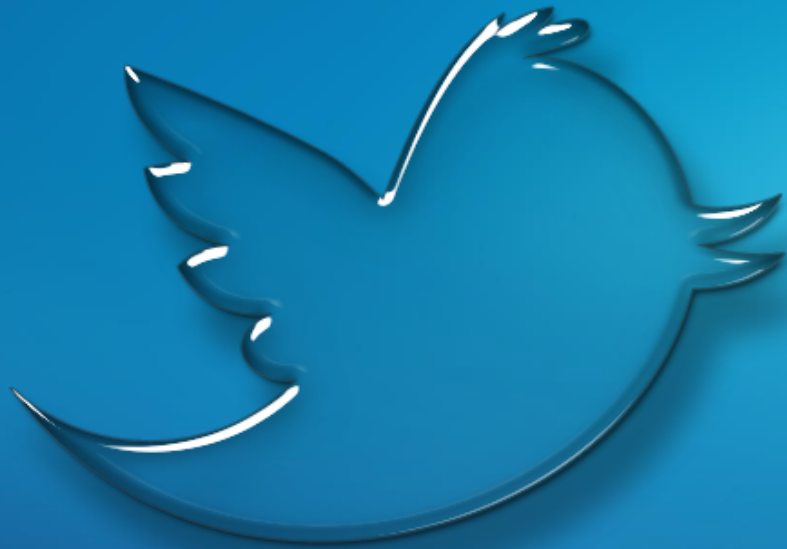
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Any
questions



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